

Project Charter



Project authorized by Terry Loftus on 3/19/21

I. Project Name

Project Name ServiceNow Education for SDCOE Employees	Start Date 03/01/21	End Date 05/07/21
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II. Project Organization

Indicate all project team members and how frequently you will communicate with them.

Project Manager <i>Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives</i> <ul style="list-style-type: none"> Peyri Herrera 	Sponsor <i>The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project</i> <ul style="list-style-type: none"> Terry Loftus
Steering Committee <i>Key people that assist the project manager in making decisions and moving the project forward</i> <ul style="list-style-type: none"> ITS Senior Leadership <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed	Stakeholders <i>An individual, group, or organization that may affect or be affected by outcome of the project</i> <ul style="list-style-type: none"> All SDCOE Employees, with an emphasis on Executive Assistants, Admin Assistants, and Program Secretaries; and new hires Computer Support Services (CSS) <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed
Project Team <i>Supports the project manager in performing work of the project to achieve its objectives</i> <ul style="list-style-type: none"> Peyri, Flora, Tyler, Candace <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed	Others Involved <i>List anyone else who will be involved and state their roles</i> <ul style="list-style-type: none"> Stacy Brandt for assistance with communications Leo Cole John V. and Uyen for guidance on ServiceNow functionality <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed

III. Project Details

Project Description <i>Write a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why?</i> <p>ServiceNow, also referenced as the SDCOE Service Portal, was launched in January 2020 to all SDCOE employees so they can enter support tickets. In February and March 2021, several fixes and updates were made to improve the customer experience.</p> <p>The goal of this project is to educate SDCOE employees on how and why to use ServiceNow:</p> <ul style="list-style-type: none"> How to log in using the SDCOE Staff Login link The difference between “requesting something” and “reporting a problem” How to use the Home search bar to search for a requestable item and to search the knowledgebase How to go to Request Something to search from the catalog How to go to Report a Problem and use the dropdown menu (“I am having trouble with”) How to use the bottom half of the screen: My Open Incidents, My Past Incidents, My Requested Items, My Closed Requests Reassure employees that tickets are reviewed and addressed in a timely fashion (they don’t fall into a black hole) <p>We will create a job aid and 2-minute video. New hires will receive the information at onboarding. A training meeting will be conducted with Executive Assistants, Admin Assistants, and Program Secretaries.</p>

The outcome of the project is to reduce the requests that come in “through the side door” (direct emails, phone calls, chats, and walk-ins to CSS and other ITS staff); instead they will be entered in ServiceNow.

Scope

Who/how many this will impact? What is included (or not included) that can help manage the expectations?

This effort will impact all SDCOE employees who request services and/or need help resolving technical issues. Because Executive Assistants, Administrative Assistants, and Program Secretaries often assist others by entering tickets on their behalf, we will work closely with that audience.

This project is not intended to educate PeopleSoft or SIS customers.

This project is for educating employees on ServiceNow as it exists in March 2021 – no ServiceNow development or changes are needed for this project.

Objectives/Success Criteria

How will you know if the project was a success? List what you are trying to accomplish and the success criteria.

At the completion of the project:

- All SDCOE employees, and especially the Executive Assistants, Administrative Assistants, and Program Secretaries, will know the expected procedure for requesting tech support
- The new job aid and video will be clear, concise, and easy to use
- More SDCOE employees will know how to access ServiceNow and correctly enter a ticket (when they need to)
- There will be a decrease in the number of emails, phone calls, chats, and walk-ins asking for assistance from CSS
- New employees will have exposure to ServiceNow at orientation/onboarding (like simply logging in to ServiceNow)

Goals Alignment

With which Board Goals and ITS Goals does this project align?

- | | |
|--|---|
| <input type="checkbox"/> #B1 Connect the educational experience to the world of work | <input checked="" type="checkbox"/> #ITS1 Maximize Customer Success |
| <input type="checkbox"/> #B2 Provide educational opportunities and supports to SDCOE schools and school districts | <input type="checkbox"/> #ITS2 Deliver Value: Applications & Systems |
| <input type="checkbox"/> #B3 Become the leader and model for innovation | <input checked="" type="checkbox"/> #ITS3 Improve Division Efficiencies |
| <input checked="" type="checkbox"/> #B4 Maximize human and operational resources to strengthen the organizational culture of SDCOE | <input type="checkbox"/> #ITS4 Be the Cybersecurity Solutions Leader |

Deliverables

Which products or results do you expect upon completion of the project?

- A job aid posted at Common Ground > Information Security > ServiceNow
- A 2-minute “How to Submit a Technology Support Ticket Using ServiceNow” video that welcomes SDCOE employees, explains how to log in to ServiceNow (active directory), explains the difference between “requesting something” and “reporting a problem”, and walks thru how to enter requests and report problems (referencing the Top 5 Requests and Top 5 Incidents)
 - Video can be accessed on Common Ground
 - Video can be played at New Hire Orientation (if there is time in the schedule)
 - Video can be played by Managers at a future department meeting
- The recorded 30-minute training meeting with Administrative Assistants/Program Secretaries posted at Common Ground > Information Security > ServiceNow
- A variety of communications from Stacy Brandt (methods are TBD)
- A script for CSS to use when someone contacts them directly

Risks

List the things that you think could be risks to the success of the project. If possible, list the mitigation strategy for each risk.

- “Frequent Flyers” might continue to go thru the side door. To mitigate this, we should have a friendly script ready to go that all agents can use to help reduce future occurrences. CSS and other agents must commit to using the script.
- SDCOE Employees might not pay attention to how to enter a ticket until they really need it. To mitigate this, we need to make the “getting started” information extremely accessible.

IV. Project Schedule & Milestones

MARCH							APRIL							MAY							
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	
	1	2	3	4	5	6					1	2	3							1	
7	8	PLANNING			12	13	4	5	6	PREP		8	9	10	2	3	CLOSURE			7	8
14	15	16	17	18	19	20	11	12	13	14	15	16	17	9	10	11	12	13	14	15	
21	22	23	24	25	26	27	18	19	EDUCATION &			23	24	16	17	18	19	20	21	22	
28	29	30	31				25	26	COMMS		30			23	24	25	26	27	28	29	
														30	31						

Based on your needs, list either the phases and/or major milestones of the projects. Include start and end dates.

Phase/Major Milestone	Responsible (Lead)	Start Date or Month Begin	End Date or Month End
<p>1. Planning (3 weeks)</p> <ul style="list-style-type: none"> Obtain from Tyler the Top 5 Requests and Top 5 Incidents (PEYRI, FLORA) Test entry of the top requests and incidents (PEYRI) Obtain from John V. the dropdown list of incidents that SDCOE staff can choose from (PEYRI) Determine if the “I am having trouble with” search box can be a Contains search instead of Begins With (for better usability) (UYEN) Work with John V. to determine who will conduct the training meeting with Admin Assistants (PEYRI) 	Peyri, Flora	3/1/21	3/19/21
<p>2. Prep Phase (3.5 weeks)</p> <p><i>Design/Develop Materials</i></p> <ul style="list-style-type: none"> Create job aid (PEYRI, CANDACE) Create video (PEYRI) Review and sign off on materials Post materials on Common Ground <p><i>Plan Meetings</i></p> <ul style="list-style-type: none"> Schedule and conduct Teams meeting with CSS to inform them of the effort (TYLER) Set up spreadsheet to capture baseline metrics (PEYRI/CANDACE) Have CSS populate spreadsheet (TYLER) Draft email to Admin Assistants and Program Secretaries (CANDACE, PEYRI) Determine date/time and schedule Teams dry run AND training meeting with Admin Assistants and Program Secretaries (CANDACE) Request from Leo that at future New Hire Orientations that ITS has 5 extra minutes to: play the 2-minute video and have all new hires navigate to ServiceNow and log in (FLORA) Find out if we can present to Managers for 15 minutes at a future COMET meeting and ask them to share the 2-minute video at their department meeting (FLORA) <p><i>Plan Communications</i></p> <ul style="list-style-type: none"> Work with Stacy on methods of communications (FLORA/PEYRI) 	Peyri, Candace, Flora	3/22/21	4/13/21

<ul style="list-style-type: none"> Draft the “friendly script” that CSS and other agents will use when employees continue to not use the system to submit a ticket (TYLER/PEYRI) 			
3. Execution: Education and Communications (2.5 weeks) <i>Conduct Meetings</i> <ul style="list-style-type: none"> Meet with CSS (TYLER) Practice/dry run for training meeting (TYLER, PEYRI) Conduct Teams training meeting with Admin Assistants and Program Secretaries (TYLER, PEYRI) TBD – Conduct presentation at COMET (TYLER, PEYRI) <i>Execute Communications</i> <ul style="list-style-type: none"> Send/post a variety of communications (STACY) 	Peyri, Tyler, Stacy	4/14/21	4/30/21
4. Closure (1 week) NOTE: We will need to capture post metrics 1-3 months later.	Peyri	5/3/21	5/7/21

V. Tools

<input checked="" type="checkbox"/> Monday.com	If Yes, which board? EPMO General Board Do any new members need to be added? Yes: Tyler (will be removed after the project ends)
<input checked="" type="checkbox"/> Microsoft Teams	If Yes, which team/channel will you use? EPMO Team > Documents > General > Projects > ServiceNow Education for SDCOE Employees (for storing documents) – Tyler and John V. need access to this 1 folder
<input type="checkbox"/> OneDrive	If Yes, whose OneDrive, and what is the folder named? _____
<input type="checkbox"/> SharePoint Site	If Yes, which site, and what is the folder named? _____
<input type="checkbox"/> Other	

VI. Other Items to Consider

- Project Budget:** Estimate the cost of the project.
- Communication Plan:** Identify all critical communication channels for project stakeholders, frequency of communication, types of information to be communicated, and method of regular communication.
- Tracking and Status Updates:** Identify the methods the project team will use to regularly update the project status including methods of tracking project progress and which organizational stakeholders receive notification of project status.
- Training Plan/Documentation Plan:** Identify any necessary training and documentation for project stakeholders, including content, delivery method, etc.
- Project Close Out:** Determine the final actions/steps to close out the project. Examples include sign off documentation, lessons learned meetings and documentation, surveys/evaluations, and a celebration and/or acknowledgement.